

CLAIMS

What is claimed is:

1. A method by which an advanced technical consulting (ATC) team may support a customer-facing portion of an organization by selectively engaging in a pre-sales technical consulting project, the method comprising:
 - receiving a request to engage in a technical consulting project;
 - identifying an initiator of the request;
 - qualifying the technical consulting project;
 - identifying an organizational ownership of the technical consulting project;
 - scoping the technical consulting project;
 - determining whether to engage in the technical consulting project;
 - selectively working on the technical consulting project; and
 - closing the technical consulting project.
2. The method of claim 1, where the request is received by one or more of, a voice mail, a phone call, an email, a written request, an in-person communication, a communication received during a different customer opportunity, and a communication received during a different customer engagement.
3. The method of claim 1, where identifying the initiator includes identifying whether the initiator is a member of the organization.
4. The method of claim 1, where identifying the initiator includes identifying whether the initiator has an established contact with the organization.
5. The method of claim 4, including gathering an initiator relationship data concerning one or more of, an initiator relationship to a customer, an initiator relationship to the ATC team, and an initiator relationship to the organization.
6. The method of claim 1, where qualifying the technical consulting project includes determining one or more of, whether the technical consulting project is a pre-sales project,

whether a customer has a support contract with the organization, whether the ATC team is interested in solving a problem associated with the technical consulting project, whether the ATC team is qualified to solve the problem associated with the technical consulting project, whether the ATC team has a resource available to engage in the technical consulting project, and whether the technical consulting project is aligned with a goal of one or more of, the ATC team, and the organization.

7. The method of claim 1, where identifying the organizational ownership of the technical consulting project comprises:

- acquiring a customer data that facilitates characterizing a customer;
- acquiring a project data that facilitates characterizing the technical consulting project;
- and
- analyzing the customer data, the project data, the request to engage in the technical consulting project, and a relationship between the initiator and one or more of, the customer, the ATC team, and the organization, to determine who is responsible for the customer.

8. The method of claim 7, where the customer data includes one or more of, a name data, an accounts receivable data, a bill paying history data, a location data, and an expertise data.

9. The method of claim 7, where the project data includes one or more of, a name data, a time estimate data, a cost estimate data, an account number, a technical consultant data, and a projected return on investment data.

10. The method of claim 1, where scoping the technical consulting project includes acquiring a scope data that concerns one or more of, a customer problem, a customer suggestion, a customer need, a business problem to be solved for a customer, a customer history with the organization, a customer history with the ATC team, a revenue associated with the technical consulting project, a cost associated with the technical consulting project, a return on investment associated with the technical consulting project, a customer expertise level, a customer architecture, a measure of success for the technical consulting project, and an expected outcome of the technical consulting project.

11. The method of claim 1, where determining whether to engage in the technical consulting project includes determining one or more of, whether the technical consulting project is a pre-sales technical consulting activity, whether the technical consulting project is appropriate for the ATC team, and whether the technical consulting project will result in a positive return on investment for the organization.
12. The method of claim 10, where determining whether to engage in the technical consulting project includes determining one or more of, whether the technical consulting project is a pre-sales technical consulting activity, whether the technical consulting project is appropriate for the ATC team, and analyzing the scope data.
13. The method of claim 7, where determining whether to engage in the technical consulting project includes analyzing the customer data and the project data to determine whether the technical consulting project is a pre-sales technical consulting activity that is appropriate for the ATC team.
14. The method of claim 1, where selectively working on the technical consulting project includes one or more of, identifying a criteria for determining a success of the technical consulting project, developing a solution that satisfies the criteria, where the solution is based, at least in part, on one or more of, a customer data, a project data, and a scope data, communicating the solution to the customer-facing portion of the organization, and selectively providing a project tracking data to a project tracking data store.
15. The method of claim 14, where the customer data includes one or more of, a name data, an accounts receivable data, a bill paying history data, a location data, and an expertise data.
16. The method of claim 14, where the project data includes one or more of, a name data, a time estimate data, a cost estimate data, an account number, a technical consultant data, and a projected return on investment data.
17. The method of claim 14, where the scope data includes one or more of, a customer problem data, a customer suggestion data, a customer need data, a business problem to be

solved for a customer, a customer history with the organization, a customer history with the ATC team, a revenue associated with the technical consulting project, a cost associated with the technical consulting project, a return on investment associated with the technical consulting project, a customer expertise level, a customer architecture, a measure of success for the technical consulting project, and an expected outcome of the technical consulting project.

18. The method of claim 1, where closing the technical consulting project comprises:
acquiring an agreement from one or more of, a customer, the initiator, and an organizational owner that the technical consulting project is complete; and
selectively making available a project experience data based, at least in part, on a project tracking data that facilitates characterizing the project.

19. The method of claim 18, where the project experience data includes one or more of, a best practices data that identifies a best business practice associated with the technical consulting project, a software error data that identifies a software error associated with the technical consulting project, a hardware error data that identifies a hardware error associated with the technical consulting project, an integration error data that identifies an integration error associated with the technical consulting project, a customer experience data that facilitates characterizing the customer as experienced during the technical consulting project, a software error resolution data, a hardware error resolution data, and an integration error resolution data.

20. A method, comprising:
an ATC team receiving a request to engage in a technical consulting project, where the ATC team is a part of an organization that includes a customer-facing part;
identifying a person who generated the request;
qualifying the technical consulting project to facilitate determining whether the technical consulting project is a type of project in which the ATC team engages;
the ATC team scoping the technical consulting project;
determining whether to engage in the technical consulting project;
the ATC team selectively working the technical consulting project; and
the ATC team closing the technical consulting project.

21. The method of claim 20, where identifying the person who generated the request includes identifying a relationship between the person who generated the request and one or more of, the ATC team, the technical consulting project, the organization, and the customer-facing part of the organization.

22. The method of claim 21, where qualifying the technical consulting project includes determining one or more of, whether the technical consulting project is a pre-sales project that concerns a problem that the ATC team is capable of solving, whether the technical consulting project is a pre-sales project that concerns a problem that the ATC team is interested in solving, and whether the technical consulting project has a measurable outcome.

23. The method of claim 22, where scoping the technical consulting project includes one or more of, determining an objective for the technical consulting project, determining an actual cost for the technical consulting project, determining an opportunity cost for the technical consulting project, and determining one or more technical parameters concerning work to be performed during the technical consulting project.

24. The method of claim 23, where determining whether to engage in the technical consulting project includes evaluating one or more of, the objective, the actual cost, the opportunity cost, and the technical parameters.

25. The method of claim 24, where selectively working the technical consulting project includes one or more of, developing software, developing hardware, debugging software, debugging hardware, integrating software with software, integrating hardware with hardware, and integrating hardware with software.

26. The method of claim 25, where closing the technical consulting project includes storing an experience data that describes one or more of, a lesson learned during the technical consulting project, a best practice associated with the technical consulting project, a software error associated with the technical consulting project, a hardware error associated with the technical consulting project, an integration error associated with the technical consulting

project, a software error resolution data, a hardware error resolution data, and an integration error resolution data.

27. A system, comprising:

a tracking data store configured to store data concerning an ATC team pre-sales technical consulting engagement;

a decision guiding logic operably connected to the tracking data store, the decision guiding logic configured to facilitate guiding one or more decisions during the pre-sales technical consulting engagement, where the one or more decisions depend, at least in part, on the data stored in the tracking data store; and

a user interface logic operably connected to the tracking data store and the decision guiding logic, the user interface logic being configured to facilitate displaying one or more data items stored in the tracking data store and one or more decision guiding data provided by the decision guiding logic.

28. The system of claim 27, where the tracking data store is configured to store one or more of, an engagement data that facilitates characterizing the consulting engagement, a customer data that facilitates characterizing a customer, an ATC team data that facilitates characterizing the ATC team, a best practice data that facilitates characterizing a best practice associated with the consulting engagement, a software error data that facilitates characterizing a software error associated with the consulting engagement, a hardware error data that facilitates characterizing a hardware error associated with the consulting engagement, an integration error data that facilitates characterizing an integration error observed during the consulting engagement, and a resolution data that facilitates characterizing an error resolution.

29. A system, comprising:

means for storing issue-resolution data associated with a pre-sales technical consulting project engaged in by an ATC team, where the ATC team supports a customer-facing portion of an organization with which the ATC team is associated by engaging in the pre-sales technical consulting project; and

means for guiding an ATC team decision during the pre-sales technical consulting project.

30. In a computer system having a graphical user interface comprising a display and a selection device, a method of providing and selecting from a set of data entries on the display, the method comprising:

- retrieving a set of data entries, where a data entry represents a piece of information associated with a pre-sales technical consulting project engaged in by an ATC team;

- displaying a subset of the set of data entries on the display;

- receiving a data entry selection signal indicative of the selection device selecting a selected data entry; and

- in response to the data entry selection signal, initiating a pre-sales technical consulting operation associated with the selected data entry.

31. A method, comprising:

- acquiring a first data that facilitates characterizing an advanced technical consulting team;

- acquiring a second data that facilitates characterizing a pre-sales technical consulting project;

- determining whether to allocate the advanced technical consulting team to the pre-sales technical consulting project based, at least in part, on the first data and the second data; and

- if the advanced technical consulting team is allocated to the pre-sales technical consulting project:

- selectively acquiring a third data that facilitates characterizing the pre-sales technical consulting project, where the third data is gathered during the pre-sales technical consulting project;

- selectively storing the third data; and

- selectively making the third data available outside the advanced technical consulting team.

32. A computer-readable medium having stored thereon a data structure comprising:

- a first field containing data associated with an ATC team pre-sales technical consulting engagement request;

a second field containing data associated with an ATC team pre-sales technical consulting engagement requestor;

a third field containing data associated with one or more parameters of a pre-sales technical consulting engagement;

a fourth field containing data gathered during the pre-sales technical consulting engagement; and

a fifth field containing a distribution data derived from one or more of, data located in the first field, data located in the second field, data located in the third field, and data located in the fourth field, where the distribution data is available to one or more members of an organization with which the ATC team is associated.

33. A computer-readable medium having stored thereon a data structure comprising one or more fields containing one or more of, a data associated with an ATC team pre-sales technical consulting engagement request, a data associated with an ATC team pre-sales technical consulting engagement requestor, a data associated with one or more parameters of a pre-sales technical consulting engagement, a data gathered during the pre-sales technical consulting engagement, and a distribution data derived from one or more of, the data associated with an ATC team pre-sales technical consulting engagement request, the data associated with an ATC team pre-sales technical consulting engagement requestor, the data associated with one or more parameters of a pre-sales technical consulting engagement, and the data gathered during the pre-sales technical consulting engagement.